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Netherlands The Road to Climate-Neutral Tourism



Perspective 2030⁷ highlights the importance of the sustainable development of the Netherlands as a destination and the need to take an integrated approach. Together with diverse stakeholders, we are striving for a country that is a good place to be – for residents, business owners and visitors alike. A country where everyone benefits from tourism and business travel, whether directly or indirectly.

The Corona pandemic has shown the relevance of the guiding principles of Perspective 2030. It has also shown that consolidation and acceleration are needed. Fortunately, consensus is more widespread than ever. On the road, we always choose our course together. Because we prioritise the common interests: the Netherlands as a vibrant destination, both now and for future generations.

During the UN Climate Conference in Glasgow last year, NBTC signed the Glasgow Declaration, together with CELTH, Merk Fryslan and over 250 other organisations: the signatories not only pledged to support international climate goals, they also committed themselves to take action. For NBTC, this action consists of making our own organisation and activities more sustainable, as well as promoting and encouraging climate-neutral tourism throughout the Netherlands.

CELTH paved the way with the Leisure, Tourism & Hospitality Sustainability Research Agenda⁷. Following on from this, we now present *The Road to Climate-Neutral Tourism*. This roadmap was compiled by the Climate Neutral Tourism working group, affiliated with the Hospitality Economy Cooperation Task Force, in collaboration with many partners from the Netherlands as

a destination. In combination with scientific facts and insights, the goal is to show where we are now and where we are going on the road to climate-neutral tourism, as well as what remains to be done to actually get there.

On this road, we sometimes encounter uncomfortable truths and we will certainly encounter measures that we know will not be carried out tomorrow. But much more often we encounter opportunities. Opportunities to follow through, to seek connections and sometimes simply to start working. While we do not always have to agree on everything: noblesse oblige. The ability to travel carries with it the responsibility to ensure that the Dutch leisure domain is as sustainable as possible.

Given the many and varied actors, we adopt a network approach in which stakeholders form a vision together, communicate aspirations and provide guidelines, but always decide for themselves - based on their own position, interests and opportunities - which initiatives they can or want to participate in. The latter takes place in coalitions of stakeholders, who join forces for aspects of the roadmap and jointly collaborate on specific action. In such cases, they may not yet be able or willing to participate in other action for reasons of their own.

Together, we are creating the roadmap that the Netherlands needs – and above all – that the Netherlands deserves!

Jos Vranken, on behalf of the Climate Neutral Tourism Working Group, Managing Director NBTC

“The ability to travel carries responsibility”

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Biesbosch - Sjoerd Bracke & Cuno de Bruin

Climate change is the greatest challenge of our time. Recent reports by the Intergovernmental Panel on Climate Change (IPCC)⁷ and the Royal Netherlands Meteorological Institute (KNMI)⁸, among others, further demonstrate the urgency: our planet is becoming too warm and, if we do nothing, the negative effects will become unsustainable.

In Europe, we are already feeling the effects. In the summer of 2021, severe floods plagued large parts of Belgium, Germany and Limburg. And in the summer of 2022, Europe was affected by extreme drought and forest fires.

Major impact on tourism sector

For the Netherlands specifically, climate change means sharply rising sea levels, declining groundwater levels and in the summer, heavy rainfall and extreme drought. Tourism, with all its potential economic and social added value, is already being significantly impacted by the effects of climate change.

At the same time, the tourism industry in the Netherlands, with all its sub-sectors, is a major contributor of CO₂ emissions.

Overnight tourism in the Netherlands alone accounted for 7.6 Megatons of CO₂ in the pre-corona year 2019, which is about 5% of total Dutch emissions¹. The impact varies considerably by sub-sector, but we are still jointly responsible for substantial emissions of CO₂. And the end is not necessarily in sight. The World Tourism Organization (UNWTO) expects that if we do nothing, tourism-related emissions will increase by another 25% by 2030.²

Every effort

The impact of the industry is therefore substantial, meaning that we will have to make every effort to start operating within the planet's limits. In the Dutch Climate Act (Klimaatwet)³ in 2019, we collectively legislated that our society will emit 49% less CO₂ by 2030 than in 1990. According to the law, by 2050, CO₂ emissions must be reduced by as much as 95% compared to 1990. The current coalition policy has even agreed to extend these targets even further: to 60% CO₂ emission reduction by 2030 and climate-neutrality by 2050.⁴

Tourism without CO₂ emissions

Fortunately, tourism without CO₂ emissions already exists. For example, NS trains run entirely on wind energy from its wind farm and train emissions are already virtually zero in several surrounding countries. The first energy-neutral accommodation has been realised and electric cars are increasingly popular. Many organisations, from governments to destination marketing or management organisations (DMOs) and tourism operators, realise that it must and can be done. In all sorts of ways, these organisations are committed to achieving climate-neutral tourism in the Netherlands: a form of tourism in which we do not emit CO₂ and where we minimise all other negative effects on the environment and maximise the positive effects.

Acceleration by working together

Although the commitment of these parties is good, the results are unfortunately not nearly good enough. On the one hand, individual action is the only way we can reduce our emissions: hotels without emissions, tourists travelling sustainably, electric transport, etc. At the same time, the task is so large and complex that it cannot be achieved by individuals alone. In addition, the sector is also diverse and fragmented, with large organisations, levels of governments, DMOs, knowledge institutions, SMEs, etc.

However, we have learned that we can increase acceleration if we work together. And this acceleration is needed now more than ever. For society, but also if we still want to be the sector that – with profitable businesses and concepts – creates economic and social added value for Dutch society in 2050.

CO₂ emissions overnight tourism Netherlands 2014 - 2021

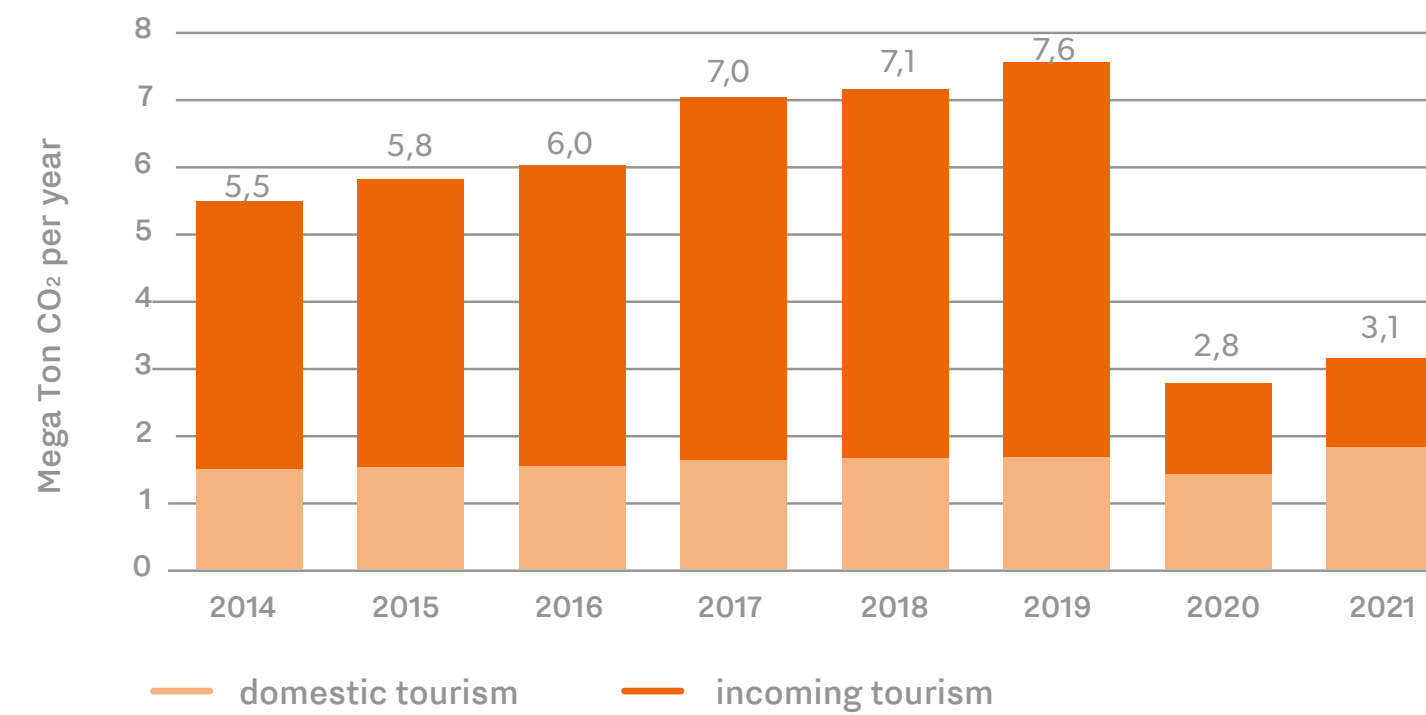
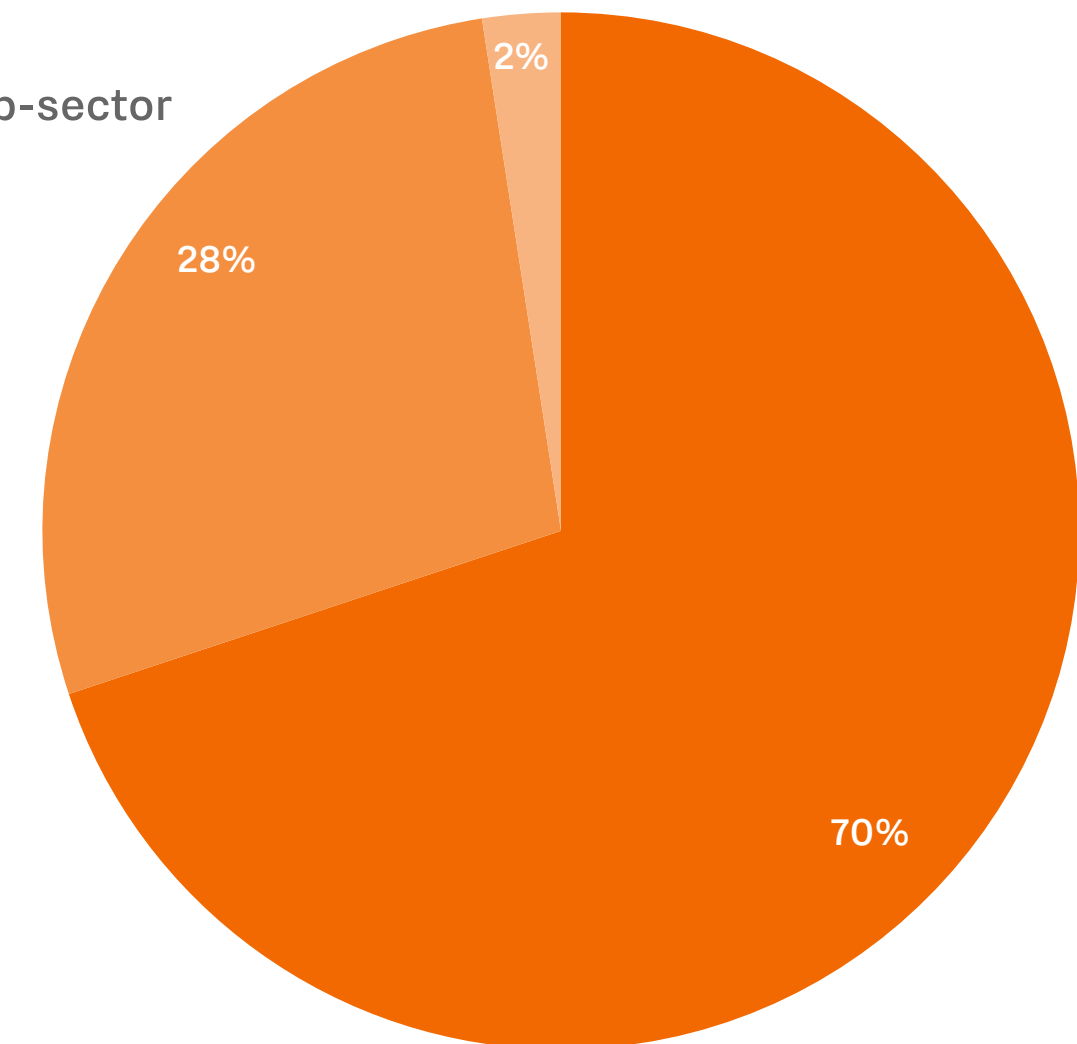


Figure 1 CO₂ emissions from overnight tourism in the Netherlands in the period 2014 - 2021

CO₂ emissions of overnight tourism 2019 by sub-sector

- Transport
- Accommodations
- Leisure / activities

Figure 2 The CO₂ emissions from overnight tourism in the Netherlands in 2019 categorised by sub-sector¹



¹ SASTDES Carbon Footprint Tool (Smart Assessment Sustainable Tourist Destinations)

1

Accountability and overview

In this roadmap, we outline what the road to climate-neutral tourism could look like: what is the current situation, what needs to happen and what action should we take now so that we can meet the 2030 and 2050 targets?

To produce this roadmap, we combined expertise from the scientific community with knowledge from the many reports available from inside and outside the sector. Examples include the Sustainability Research Agenda, Leisure, Tourism & Hospitality,² EU Transition Pathway for Tourism² and the Glasgow Declaration of Recommended Actions.² We supplemented this input with the experience of a large number of professionals at companies, levels of government, knowledge institutions, DMOs and sector organisations, who are committed to the Netherlands as a destination on a daily basis² All of these insights together form the core of this roadmap, which is structured around the five pillars of the Glasgow Declaration:²

- **measurement** and research;
- **reducing** emissions;
- **strengthening** ecosystems;
- **funding** and support;
- **cooperation** and leadership.

Chapters 3 through 7 focus on these pillars. The status of each pillar is briefly described and, where possible, the action undertaken is listed in a matrix for each stakeholder group. These stakeholder groups obviously only provide a framework: for example, the action undertaken may only apply to part of the specific stakeholder group, while other action may require further elaboration and specification.

Before this, in Chapter 2, we identify five strategic cornerstones for working towards climate-neutral tourism in the Netherlands.

No silver bullet

Separate, stand-alone analyses, roadmaps and action plans can be developed for each of the topics and sub-sectors mentioned in this report. Indeed, these must be developed if we really want to come close to achieving climate-neutral tourism in the Netherlands. And while this paper is not a silver bullet for the entire sector, it can provide starting points for parties to work together where we identify shared opportunities and challenges. This will allow us to work together even better than we already do, on the road to climate-neutral tourism.

Different organisations, different roads

And while this document reflects the input of all stakeholders currently involved as completely and accurately as possible, the involvement of these parties does not automatically mean that they fully support all the analyses and action described in this publication. Most importantly, on the road to a sustainable and climate-neutral future, these parties want to jointly look for opportunities and challenges that we can work together on even more intensively. In doing so, each organisation is free to set its own pace and commitment. With respect for each other's interests and capabilities, but bearing in mind what is coming our way, we are therefore looking for smart coalitions and collaborations.

This is not an easy task, but it can be done. Our sector also deserves to have the necessary leadership to take on these kinds of tasks with energy and passion, to ensure that in 2050 we will continue to be a sector that generates economic and social added value for Dutch society.

² See Annex 1 for a full list of participating parties



2

Five basic principles for climate-neutral tourism

2. Five basic principles for climate-neutral tourism



1. An integral issue

The issue of sustainable tourism is large, complex and in some respects overwhelming. The task touches on many other aspects – economic, social and environmental – that are closely intertwined. Therefore, committing to climate-neutral tourism cannot be achieved without considering the social and economic impact of visitors and ecological elements such as biodiversity, circularity and water quality. Both integrally within the sector and in conjunction with the many transitions outside our sector. At the same time, the degree of urgency is high and growing. Awareness of this interplay of forces is essential if we are to work effectively toward climate-neutral tourism.



2. The human factor

The IPCC has calculated that 60% of the required reduction in CO₂ emissions must come from behavioural change.⁷ But behavioural change is not easy for people. While public awareness of climate change is increasing, financial incentives, social norms and entrenched patterns of behaviour are preventing people from taking major steps on their own. Research by the European Travel Commission (ETC) and CELTH⁷ found that sustainable tourism will remain a pipe dream if the travel sector and governments do not work together to make tourist product ranges significantly more sustainable. Because, as consumer research has shown, most groups of tourists are aware of the importance of more sustainable travel, but the vast majority do not yet translate this into sustainable choices.



3. From intent to action

With the goal of climate-neutral tourism, the challenges ahead of us are so great that one or a few solutions are not enough. We need to proceed simultaneously with immediate reductions in emissions, as well as the development of technological innovations and a change in the economic system that forms the framework for organising our society. In short, we are jointly committed to all the options that are achievable. Intentions are no longer enough; it is time for concrete action.



4. Climate justice

Climate justice revolves around the principle that those who most disrupt the climate have the greatest responsibility to reduce their impact. Because different individuals, companies and countries affect the climate in different ways - and benefit from it in different ways. If we believe that tourism must provide added value for all Dutch people, as we present and explain in Perspective 2030, then climate action must also take that into account: the biggest polluters are the ones who should take the biggest steps. And together we will have to help those who find their sustainability journey difficult, whether due to financial concerns or otherwise.



5. Open, transparent and collaborative

Climate-neutral tourism is an integral task. Achieving this will require us to work together in a unified and open-minded manner. The road to climate-neutral tourism is long and complicated, and not everything we do will turn out right the first time. We should be able to express this to each other. Because only by being transparent can we learn from each other. In this, we do not see failure as a disgrace, but as a learning opportunity. It is up to all of us to create this culture together.



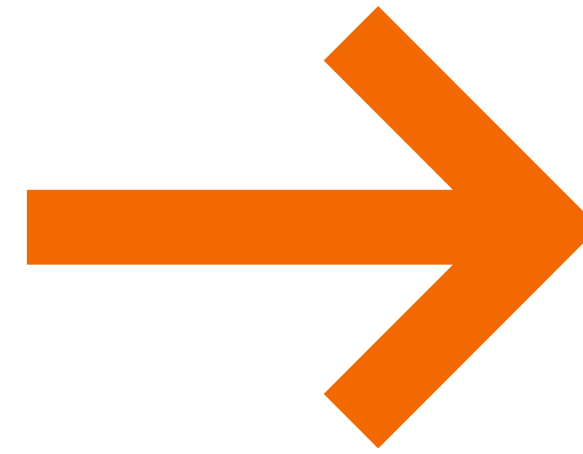
3

Measurement and research

3. Measurement and research

Where do we stand?

Although more and more is known about the CO₂ emissions produced by the tourism industry, for example at the destination level, there is still a need for additional and more findable and accessible research in the area of climate-neutral tourism. For example, many destinations and business owners need insight into their current CO₂ emissions. However, existing tools that facilitate this are not always easily usable or applicable, or they lack the right scale. And destinations and business owners often lack the resources to facilitate the necessary research themselves.



What is needed?




Unambiguous emissions measurement tools are needed that are easy to apply, can be compared with each other and enable the realisation of reduction targets. In this regard, three elements are essential, with the first two serving the third.

- data on current emissions from businesses and visitors to a destination (status quo);
- an approach for unambiguous and comparable measurements (definitions and comparability);
- the road to zero emissions, in other words: what savings and investments should take place and when to ensure that emissions actually reach zero by 2050?

These issues lend themselves ideally to cooperation within the Netherlands as a destination. Particularly between similar companies, facilitated in this by government, DMOs, industry associations and knowledge institutions.

In addition, specific research into the human side of the climate issue is needed: what makes travellers and business owners make sustainable choices or not, and how can those choices be influenced?

3. Measurement and research

Line of action	Government	Business sector	Branch organisations	Knowledge institutes	DMOs
 <p>Monitoring, steering and coordination</p>	<ul style="list-style-type: none"> facilitate monitoring of emissions and reduction by sub-sector and at destination level; use internationally standardised climate indicators as Key Performance Indicators for the success of destination tourism; make the monitoring and steering of climate-neutral tourism part of the task of the DMOs. 	<ul style="list-style-type: none"> monitor and manage emissions of own businesses. 	<ul style="list-style-type: none"> encourage and help SME business owners to develop and implement simple monitoring tools. 	<ul style="list-style-type: none"> develop useful steering mechanisms for governments, DMOs and business owners; coordinate and develop public-private research proposals focused on insights and tools for business owners to reduce emissions. 	<ul style="list-style-type: none"> use CO₂ emissions as a Key Performance Indicator for destination development; encourage and assist SME business owners to develop and implement simple monitoring tools.
 <p>Define the path to climate-neutral business operations</p>	<ul style="list-style-type: none"> facilitate and co-fund cross-sectoral research. 	<ul style="list-style-type: none"> implement research on the best road to zero emissions in own approach. 	<ul style="list-style-type: none"> encourage, facilitate and co-fund joint research on zero emissions by sub-sector; share relevant results with the general public. 	<ul style="list-style-type: none"> conduct research on zero emissions by sub-sector. 	<ul style="list-style-type: none"> encourage joint research on zero emissions by sub-sector; share relevant results with the general public.
 <p>The human factor</p>	<ul style="list-style-type: none"> facilitate and co-fund research focused on the behavioural side of the climate issue. 	<ul style="list-style-type: none"> use existing and new insights, for example on how to entice consumers to make sustainable choices. 	<ul style="list-style-type: none"> make insights into behavioural influence available to the general public; assist in bringing about behavioural change among business owners. 	<ul style="list-style-type: none"> investigate the behavioural side of the climate issue, specifically for the benefit of business owners and consumers in the tourism sector. 	<ul style="list-style-type: none"> make use of insights into the behavioural influence of smart choices regarding informing and persuading consumers and business owners to make sustainable choices.

Contextual example

1

The study *The Road to Net Zero Emissions* conducted by Booking.com together with EY Parthenon and OC&C identifies, for the accommodation sector, the potential savings that will have the greatest impact compared to the additional costs. In the case of Dutch hotels, they see the main opportunities for reducing emissions, which also entail cost savings, as focusing on energy-efficient climate systems and appliances (especially air conditioning) and installing double-glazing. While this study does not describe the entire road to zero emissions, it does show what investments accommodations can already make to reduce their emissions, mostly based on a positive business case.

2

The SASTDes (Smart Assessment Sustainable Tourist Destinations) Carbon Footprint Tool allows destinations across Europe to calculate the CO₂ emissions of visitors at their destination. The tool calculates this based on the mode of transport by origin market, the number of overnight stays at the destination, the shares of different types of accommodation and a range of tourism activities that people do or do not undertake at the destination. The tool can also be used to provide insight into which measures at a destination will have what effect on CO₂ emissions. For example: what happens if visitors travel by train or bus instead of by plane? Or if a destination makes different choices in terms of marketing/ target groups, such as by focusing more on visitors from surrounding countries and less from further afield?

3

Realising that steering effectively towards sustainability requires a solid knowledge base, Croatia introduced the Sustainable Tourism Observatory, or CROSTO for short, in 2016. This project focuses on monitoring the sustainability of tourism development on the Adriatic coast. It uses international UNWTO definitions and standards, including the European Tourism Indicator System (ETIS). Action already implemented under CROSTO include creating engagement with local stakeholders, standardisation of measurements in surrounding regions, initiation of research projects and development of a handbook to accelerate the application and implementation of insight into areas.

4

Reducing emissions

To achieve climate-neutral tourism in the Netherlands, it is necessary to reduce emissions from all types of tourism-related activities.

This chapter outlines the current situation and the concrete action needed to achieve the desired reduction. In this, we distinguish between:

- **transport to the Netherlands;**
- **transport within the Netherlands;**
- **water transport;**
- **accommodation;**
- **leisure options;**
- **tour operators, including online tour operators.**

We describe the current state of affairs for each sub-sector in broad terms. Significantly, sub-sectors are often difficult to isolate as they always intersect and frequently overlap. As a result, action mentioned for one sub-sector is often relevant to other sub-sectors. Given the considerable complexity and stratification of climate-neutral tourism, a closer look at all relevant sub-sectors is obvious. The links and references in the text provide a good starting point for this.



4.1 Transport to the Netherlands

Where do we stand?

Transporting tourists to their Dutch destinations³ accounts for 5.3 megatons of CO₂ per year (2019). Of these emissions, more than 80% originate from aircraft emissions and less than 10% from passenger car emissions⁴. Also on a per-tourist basis, an aircraft emits more emissions per passenger-kilometre on a per-person basis than a passenger car, as the figure⁵ below shows. While the difference per person per kilometre may not seem significant at first glance, the average distance travelled by plane is often much greater than the distance covered by a car, which increases the differences in CO₂ emissions. In terms of transport to the Netherlands, aviation contributes the most to CO₂ emissions. In June

2022, the cabinet decided to reduce the number of permitted flight movements to and from Schiphol from 500,000 to 440,000 per year.⁷ However, researchers point out that the climate impact of capacity reduction is uncertain because airlines could choose to use larger, more polluting aircrafts.⁷ The introduction of the planned CO₂ ceiling will allow the government to control air traffic emissions even more directly. On top of this, the government, both nationally and at the European level, is focussing on blending obligations for renewable fuels. These measures from the National Aviation Agreement⁷ and the Civil Aviation Policy Memorandum 2020-2050⁷ offer the aviation sector an opportunity to achieve

more volume if it innovates faster and more effectively. The fewer emissions per passenger flown in, the more visitors fit within the CO₂ budget.

In this way, innovations that can make aviation more sustainable are more likely to emerge quickly. Researchers indicate that the projected technological developments are not yet sufficiently well developed to justify - within emission limits - maintaining, let alone expanding, the number of flights.⁷ This makes it essential that the Netherlands as a destination fully commits to other more sustainable means of transport.

³ It is obvious that it is not only transport to the Netherlands, but also from the Netherlands, that has a significant impact on the climate. Although this chapter focuses on transportation to the Netherlands, given the roadmap's focus on the destination, there are logical opportunities for collaboration between stakeholders regarding both inbound and outbound visits in terms of the development of action and follow-ups.

⁴ SASTDES Carbon Footprint Tool (Smart Assessment Sustainable Tourist Destinations)

⁵ Emission factors are taken from CARMACAL, Travelife's Carbon Management Tool for Tour Operators, designed by the Centre for Sustainability, Tourism and Transport, which is part of BUAs. For converting vehicle emissions per km to passengers, an average occupancy rate of 2.5 persons per vehicle (and 1.25 persons on a motorbike) has been assumed.

Emission factor by type of means of transport

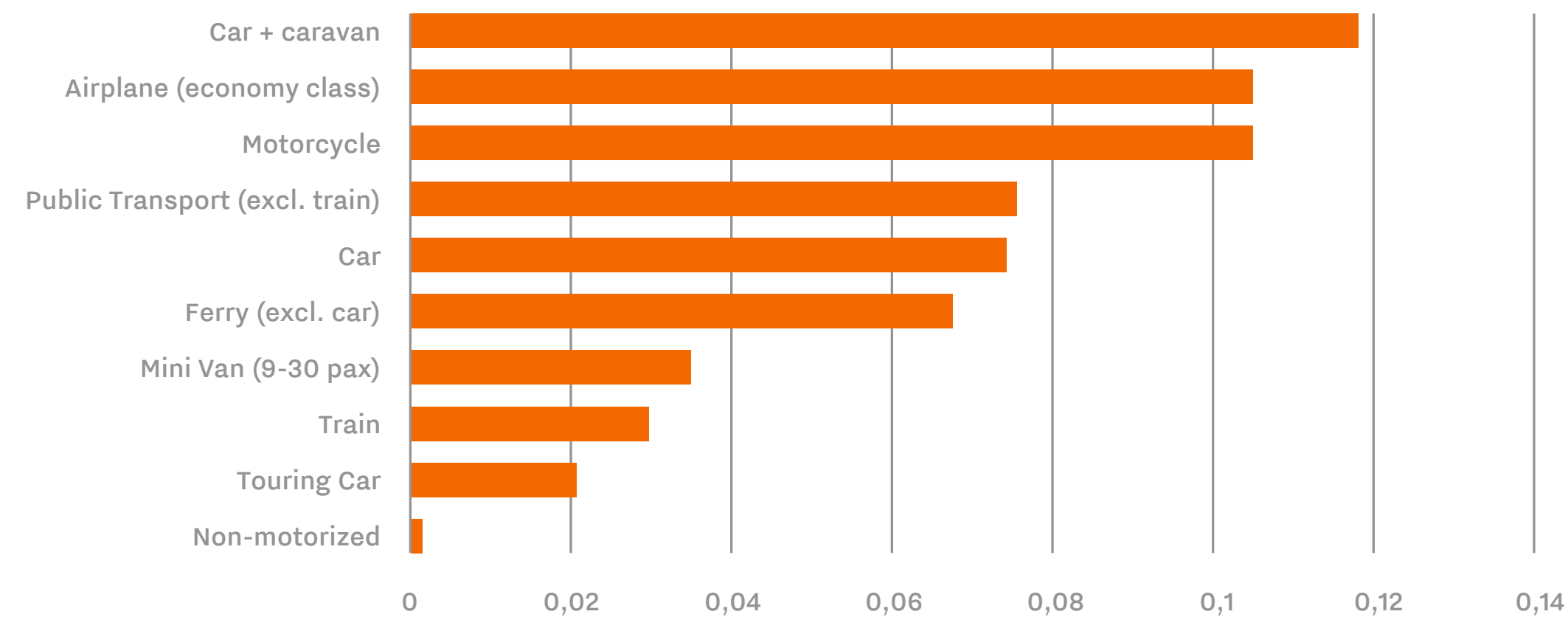
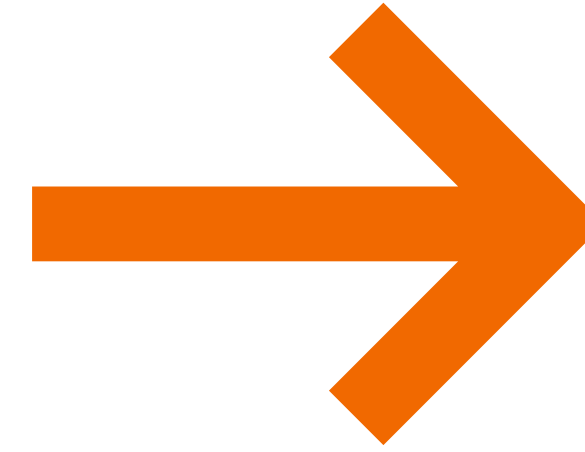


Figure 3 Emission factors of different means of transport. Emissions are shown in kilograms per passenger kilometre.⁴

■ Emissions (kg/pkm)

4.1 Transport to the Netherlands

Cars are responsible for a substantially smaller, but still significant, proportion of transport emissions to the Netherlands. Electrification of the vehicle fleet is the main route to zero-emission car transport. The Netherlands is committed to making newly purchased cars completely emission-free by 2030.⁷ The date applied by European policy is 2035.⁷ Providing high-quality facilities for electric cars is very important for the Netherlands as a destination. Nowadays, the train is proving to be a viable sustainable alternative within Europe on some major air routes, such as the Paris-Amsterdam/Amsterdam-Paris and London-Rotterdam/Rotterdam-London routes. The number of high-speed trains and overnight train connections to and from the Netherlands has expanded in recent years and their popularity is increasing. Because trains can be operated fully electrically, emission-free transport is close at hand. Indeed, Dutch Railways (NS) currently operates its trains climate-neutrally much of the time, with a fossil backup for periods of low wind.⁷ Particularly for short- and medium-distance travel and between main hubs, trains are an increasingly sustainable alternative to planes and cars.





What is needed?

Cooperation in different areas is needed to ensure that visitors travel to the Netherlands using as few emissions as possible. Reducing dependence on aviation is one of the most important transition points in this regard. An important condition for the flights that continue to take place is that they are adequate for the destination. Investing in an eco-efficiency model, where the economic and social impact of visitors is measured against the ecological impact of their visit, can help us utilise the limited number of flight movements as effectively as possible. If we are to achieve completely emission-free flights in the long term, we must commit to innovation in aviation. European coordination is extremely important for this, while it should not delay the necessary action.

In addition, we need to make alternative means of transportation attractive and accessible. This involves ensuring that there are sufficient charging facilities for electric cars (see also Transport in the Netherlands) and the integration of European rail lines, investment in long-distance routes and simplification of booking options for rail transport. Finally, there is an ongoing need to raise consumer awareness of sustainable transport options to the Netherlands, directly in campaigns and indirectly through nudging during the customer journey.

4.1 Transport to the Netherlands

Line of action	Government	Business sector	Branch organisations	Knowledge institutes	DMOs
 <h3>Reduce dependence on aviation</h3>	<ul style="list-style-type: none"> introduce CO₂ ceiling; reduce the number of slots allowed at Dutch airports; encourage European integration and cooperation in aviation; Eco-efficiency: adopt the most valuable visitors per unit CO₂ in policy. 	<ul style="list-style-type: none"> reduce the number of flights; develop trips, including package trips, to destinations accessible by sustainable transport; replace unsustainable transport with sustainable alternatives for existing trips. 	<ul style="list-style-type: none"> convey the importance of reduced flights to the general public; Encourage European integration and cooperation in aviation. 	<ul style="list-style-type: none"> prepare an eco-efficiency index in order to select the most valuable flights possible. 	<ul style="list-style-type: none"> focus marketing activities on domestic and neighbouring countries; only apply 'far away' marketing on the basis of the eco-efficiency index: most valuable visitor per unit of CO₂.
 <h3>Encourage more demand for sustainable mobility</h3>	<ul style="list-style-type: none"> incentivise the use of sustainable transport by implementing higher prices for the most polluting means of transport; support this transition with smart consumer campaigns. 	<ul style="list-style-type: none"> educate and facilitate customers in their choice of sustainable transport; join coalitions to make transport, including business transport, more sustainable. 	<ul style="list-style-type: none"> provide assistance to organisations to join coalitions for making transport, including business transport, more sustainable. 	<ul style="list-style-type: none"> explore and test the best options for enticing visitors to choose sustainable transport. 	<ul style="list-style-type: none"> actively approach visitors with relatively sustainable mobility profiles; both Dutch customers and visitors from surrounding countries; make consumers aware of the most sustainable way to get to their destination; encourage travel trade partners to include sustainable transport in their product range.
 <h3>Electrify the vehicle fleet</h3>	<ul style="list-style-type: none"> implement and further increase obligations for electric car sales; incentivise the purchase of electric cars; facilitate fast charging facilities along road networks. 	<ul style="list-style-type: none"> facilitate electric transport by means of adequate charging facilities. 	<ul style="list-style-type: none"> convey the importance of facilitating electric cars to the general public. 		<ul style="list-style-type: none"> convey the importance of electric transport to local government and business; educate consumers about electric charging options en route to and at their destination.
 <h3>Train as an attractive alternative</h3>	<ul style="list-style-type: none"> focus on international coordination and integration; invest in rail as a sustainable alternative for short- and medium-distance travel. 	<ul style="list-style-type: none"> launch private initiatives (for example, for night trains); improve booking platforms specifically for sustainable transport options; initiate arrangements with sustainable carriers. 			<ul style="list-style-type: none"> proactively highlight sustainable transportation options to the destination (in campaigns and provision of information).

Example

1

Tour operator *Avontuur Dichtbij* is attempting to reduce dependence on air travel by focusing on local product ranges, both for individual and group travel. Or, as they put it themselves: 'Travel for adventurers who dare to step out of their comfort zone, close to home.'

2

Norway is making a large-scale commitment to promote the purchase of electric cars. The goal: by 2025, all newly sold cars will be emission-free. The purchase of an emission-free car is incentivised with subsidies and discounts, for example on ferries, parking and toll roads. Owners of fossil-powered cars also pay more road tax than owners of zero-emission cars. Through continuous adjustments to various taxes and incentives, the Norwegian government is trying to meet the 2025 target without the need for a ban.

3

The popularity of train travel can also be seen from the expansion of the product ranges in recent years. For example, since 2020 Eurostar has offered a direct connection between Amsterdam, Rotterdam and London, since 2021 night trains have been running again to various destinations including Vienna and Zurich, and in May 2022 TUI started train travel to six European destinations. Moreover, international train travel appears to be rapidly increasing in popularity. While air travel in the first six months of 2022 still showed 10-25% fewer passengers than in 2019, international train travel grew significantly, despite the fact that between 2017 and 2019 there was already substantial growth in international train travel. This is a huge opportunity to reduce emissions via changed travel and visitor flows based on other means of transport, as well as reducing dependence on aviation.

4

Anders Reizen Coalitie: is an alliance of over 70 large organisations representing 550,000 employees. Their joint goal is to halve CO₂ emissions from business travel by 2030 (compared to 2016). To achieve this goal, the coalition has also translated the most effective measures into a front-runner programme of best practices.



4.2 Transport in the Netherlands

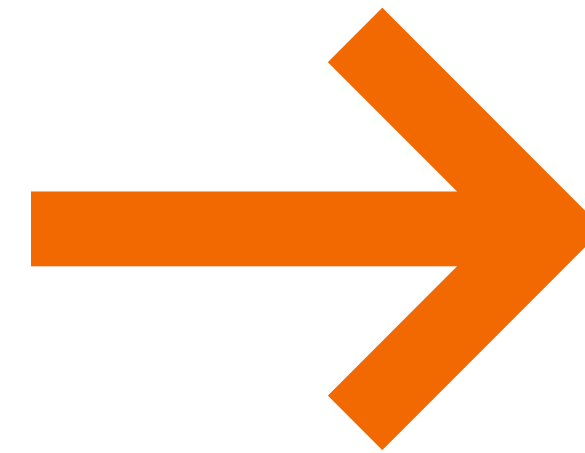
Where do we stand?

Visitors to the Netherlands mainly use a rental car (28%) and bicycle (24%) for transport at the destination, or they choose to walk (18%)⁶. For their holidays within the Netherlands, 88% of Dutch people use a car to travel to their destination⁷. This makes the challenge twofold. On the one hand: enticing motorists to choose more sustainable transport options. On the other hand: making the kilometres travelled by passenger cars climate-neutral.

For the first time, the attractiveness of alternatives is leading. For example, several cities and provinces are committed to improving their cycling infrastructure and promoting cycling as a means of transport. The current cabinet's cycling vision⁸ includes improving the connection between cycling and public transport hubs, for example with an increasing number and more spacious bicycle parking facilities. At the provincial level in particular, governments are working with DMOs to continuously improve bicycle routes and infrastructure.

This will not replace all travel by car. Electrification is therefore necessary, as also indicated in the chapter on Transport to the Netherlands. Currently, the Netherlands is one of the leaders in Europe when it comes to charging infrastructure. By June 2022, the Netherlands had nearly 100,000 public

and semi-public charging points for electric cars and another more than 250,000 home charging points. The National Charging Infrastructure Agenda, a collaboration between the national government, provinces, G4, grid operators and market players, focuses on an accelerated increase in the number of charging points. A potential major barrier to this is the grid capacity available. The national government is trying to manage this by focusing on 'smart charging' and by identifying and addressing future bottlenecks in the power grid⁹ in a timely manner.







What is needed?

The expansion of electric car charging points is needed, especially in locations that are important for tourism and recreation. This will encourage the use of electric cars, including on holidays. Combining electrification with other integral challenges, such as managing congestion, is an interesting option, as shown by the example of Renesse (see box). In addition, visitors who use electric transport offer an economic contribution to the business case for extra charging infrastructure in locations where local use is still unsatisfactory. Tourism business owners will also have to start facilitating electric transport satisfactorily, for example by providing charging stations at their businesses. This increase in charging infrastructure for the tourism sector is ideally closely linked to the national electrical charging task and may even proactively contribute to it. The recreational and tourist hotspots in the Netherlands deserve attention as part of the national electrical charging task, so that these spots can also be reached sustainably by visitors. The overarching precondition, however, is that energy generation is sustainable.

In the short term, we need to maintain the public transport network alongside this and make it more accessible to foreign visitors in particular. We need to improve sustainable last mile solutions, from hubspot to hotspot. By continuing to invest in recreational cycling infrastructure alongside this, we will continue to position the Netherlands as the pre-eminent cycling country, a destination that is experienced as being attractive and sustainable.

⁶ Inbound Tourism 2022 Survey, NBTC (not yet published; based on unweighted results through August 2022 (n = 7,276))

4.2 Transport in the Netherlands

	Line of action	Government	Business sector	Branch organisations	Knowledge institutes	DMOs
	Public transport as an attractive alternative	<ul style="list-style-type: none"> governments include tourism potential and climate requirements in public transport concessions. 	<ul style="list-style-type: none"> offer public transport proactively, including as part of packages. 		<ul style="list-style-type: none"> identify tourism potential with regard to public transport. 	<ul style="list-style-type: none"> make public transport central to the promotion of and information about the destination.
	Last mile solutions	<ul style="list-style-type: none"> identify last mile bottlenecks, invest with the market in sustainable solutions; learn from good examples at home and abroad. 	<ul style="list-style-type: none"> facilitate last mile solutions: for example, transfers not only from airports, but also from train stations and transferium. 		<ul style="list-style-type: none"> conduct research into successful last mile solutions and share knowledge about them. 	<ul style="list-style-type: none"> promote more difficult to reach parts of the destination only in combination with sustainable ways to get there.
	Improved cycling infrastructure	<ul style="list-style-type: none"> invest in tourist cycling infrastructure; increase road safety of electric cycling, including by increasing awareness about and interaction between cyclists and walkers. 	<ul style="list-style-type: none"> facilitate electric charging for bicycles as well as opportunities for bicycle parking. 	<ul style="list-style-type: none"> inform business owners about the increasing importance of electric cycling. 	<ul style="list-style-type: none"> explore the safe coexistence of different means of transport. 	<ul style="list-style-type: none"> place cycling at the centre of the promotion of and information about the destination; advise on bicycle accessibility to tourist sites of importance.
	Faster rollout of charging infrastructure for bicycles and cars	<ul style="list-style-type: none"> coordinate and accelerate further roll-out of charging infrastructure; avoid obstacles in doing so (for example, limited capacity of the power grid). 	<ul style="list-style-type: none"> facilitate quick charging facilities for guests. 	<ul style="list-style-type: none"> represent the interest of tourism business owners in the further rollout of charging infrastructure. 	<ul style="list-style-type: none"> develop/share data and insights for the business case 'the visitor as user of charging infrastructure'. 	<ul style="list-style-type: none"> inform visitors about electric charging options at destination; provide overview; emphasise the need for charging options at tourism hotspots, including advice on how to approach this.

Example

1

The municipality of Schouwen-Duiveland is committed to sustainable transport for the Renesse tourist transferium. An increasing number of electric cars can be charged at the transferium. Moreover, annually, from May to September, various forms of sustainable transport are available to transfer of passengers from car parks to the various beaches and campsites in the region.

2

The Swiss Travel System allows visitors to Switzerland to combine all their tourist travel needs in one ticket. This ticket, available in several variants, allows visitors to travel on almost all types of national and local public transport. They also receive discounts on various cable cars as well as admission to museums.

3

Netherlands Cycling Country; Dutch people cycle an average of 2.6 kilometres per day. That is the most of any country in the world. It has been calculated that if everyone cycled as much as the Dutch on a daily basis, it would save almost 700 million tonnes of CO₂.⁷ The Netherlands also has relatively high quality cycling infrastructure. For example, with 12,500 bicycle parking spaces, 'bicycle city' Utrecht has the largest bicycle parking facility in the world, which in addition to bicycle parking, also provides a continuous connecting route that gets cyclists from A to B faster and more directly.

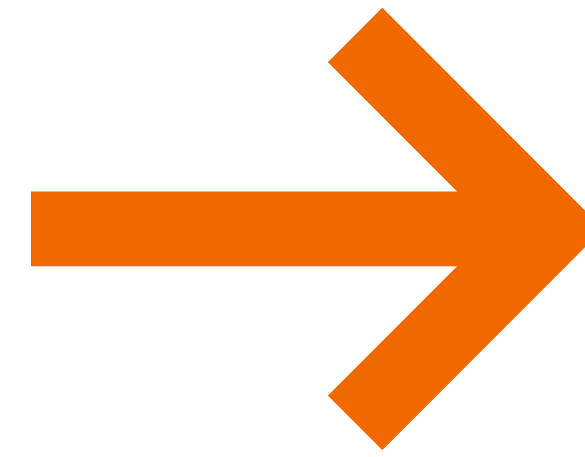


Where do we stand?

Transport by water, ferries or sea and river cruises, does not involve the largest numbers of passengers/travellers for the Netherlands as a destination. However, it is a sub-sector with a significant climate impact. Emissions from sea cruises are many times greater than those from ferries or other ships: a large cruise ship emits an average of 208 kilotons of CO₂ annually, compared to 21 kilotons for a larger ferry. The impact of smaller ships, including river cruise ships and ferries, is much smaller.⁷



According to the cruise industry, Liquefied Natural Gas (LNG) can serve as an interim solution on the road to climate-neutral cruising. In fact, this fuel leads to about 20-25% less CO₂ emissions than conventional fuel oil. For the time being, however, only a very small percentage of cruise ships operate on LNG. Nevertheless, the cruise industry has a goal of net zero emissions by 2050. Renewable fuels play an important role here, as does the utilisation of green shore power in ports. According to the Cruise Lines International Association, by 2035 all cruise ships will be equipped with the infrastructure required for this purpose.⁷ However, the road to climate-neutral cruising is long and complex, partly because many of the desired innovations are currently not being developed.

With the proposals in the Fit-for-55 package,⁷ the European Union is promoting the use of green fuels in shipping and the addition of the shipping sector to the European Emissions Trading Scheme (ETS). This is expected to create incentives that will make the sector more sustainable faster. Dutch cities such as Rotterdam and Amsterdam are also pushing for the use of shore power while in ports to reduce climate impact and air pollution at the quayside.



What is needed?

Although the number of travellers arriving in the Netherlands by ferry or cruise ship is relatively small, we must prevent this sub-sector from becoming a blind spot. Insight into exact emissions and their development needs to be independently researched and monitored. At the same time, we want to work together to find the best ways to make this sub-sector climate-neutral. Transport over water should be included in the proposed eco-efficiency approach: focusing on the most valuable visitor per unit of CO₂. At the time of preparing this roadmap, it is being investigated whether emission-free cruising, especially for sea cruises, is a realistic goal to work towards. Levels of governments and the sector should also consider scenarios in which it may prove necessary to shrink this sub-sector.

Line of action	Government	Business sector	Branch organisations	Knowledge institutes	DMOs
 <p>Development of knowledge and insight</p>	<ul style="list-style-type: none"> facilitate research and monitoring of the environmental impact of ferries and sea and river cruises. Make this data publicly available; facilitate the broad development of independent knowledge on the economic, social and environmental impact of sea and river cruises. 	<ul style="list-style-type: none"> publish available data, collaborate with researchers. 	<ul style="list-style-type: none"> facilitate research, publish available data. 	<ul style="list-style-type: none"> investigate and monitor the environmental impact of ferries and sea and river cruises; develop comprehensive and detailed knowledge on the economic, social and environmental impact of sea and river cruises, for example through a PhD or Professional Doctorate track. 	<ul style="list-style-type: none"> raise awareness among consumers and promote more sustainable choices; be involved in knowledge development and use this knowledge as a basis for choices regarding the stimulation/inhibition of cruise ship growth.
 <p>Decrease dependence on the sea cruise industry</p>	<ul style="list-style-type: none"> set requirements for maximum emissions from sea cruise ships, both en route and while docking; maintain a corresponding CO₂ ceiling and cap the number of ships docking. 	<ul style="list-style-type: none"> reduce reliance on sea cruises; consider a contraction scenario. 	<ul style="list-style-type: none"> share knowledge with the general public on the consequences of possible contraction scenarios. 	<ul style="list-style-type: none"> explore the smartest ways to reduce the decrease in CO₂ emissions from sea cruises; share this information with relevant levels of government. 	

Example

1

Norway's many ferries are increasingly operating on a fully electric basis. In 2021, the largest electric ferry ever commissioned started operating on Norway's busiest ferry route. The 139-metre Bastø Electric carries up to 600 passengers and 200 cars per trip. Once the other two ships on the line are also replaced by similar electric models, 3.8 million passengers and 1.8 million vehicles could be transported electrically on this route annually.

2

Passenger Terminal Amsterdam (PTA) is accelerating the installation of green shore power for sea and river cruises. PTA's goal is that by 2025, all cruise ships in operation will use this sustainable power supply. It is expected that by eliminating the need for ships to run their engines, emissions and nuisance will be reduced. This measure is part of the Clean Shipping Vision⁷ of PTA.



4.4 Accommodation

Where do we stand?

Accommodation accounted for around 28% of total travel-related CO₂ emissions in 2019 (2.1 Megatons CO₂)⁷. On average, an overnight stay in Dutch tourist accommodation produced 17 kg of CO₂ emissions per guest per night in 2019. A structural reduction in emissions from both existing and new-build facilities is therefore an important step in achieving the sustainability goals.

Accommodations consist mainly of hotels, campsites, bungalow parks and holiday homes. The business owners of these accommodations differ in organisational size and in the extent to which they pursue sustainability. The study by Booking.com distinguishes between accommodation business owners who are frontrunners, partakers and spectators. Each of these groups is embracing sustainability with different motives and at a different pace.⁷ This is consistent with research by Amsterdam & Partners, which also shows that a small group of business owners are intrinsically motivated to operate their hotels in a climate-neutral way and make them sustainable in other ways, while others are waiting to see what customers or the government will demand of them.

However, many business owners and investors currently have the ability to achieve CO₂ neutral accommodation. The technology to do this is available. It is up to various

stakeholders to work together to resolve any difficulties that remain in this regard, for example when it comes to support with funding or resolving split incentives: situations where investors do not directly benefit from their sustainability investments. Furthermore, several provinces are working on revitalising holiday parks. However, in these schemes, sustainability or climate-neutrality is not always an issue. Larger chains usually make their product ranges sustainable using sustainability labels such as GreenKey. There is still a lot of confusion, however, among business owners and consumers about the meaning and value of such labels and certifications. There are a multitude of labels and certifications available,⁷ leading booking and review websites like Booking.com and

Tripadvisor to choose to implement their own, not independently certified, sustainability system.

Pending European decision-making on sustainability labels, several countries are introducing their own 'white label'. Such a label uses its own standards, but also gives business owners the right to use this label for their existing similar certification. The idea is that this will create clarity for consumers and limit the extra administrative burden for business owners.

The EU identifies independence and third-party verification as important elements of a successful label. The energy labels for white goods and for homes, both initiated and controlled by the government, are good examples of effective labels.

Emissions from overnight stays by type of accommodation 2019 (Mtonne CO₂)

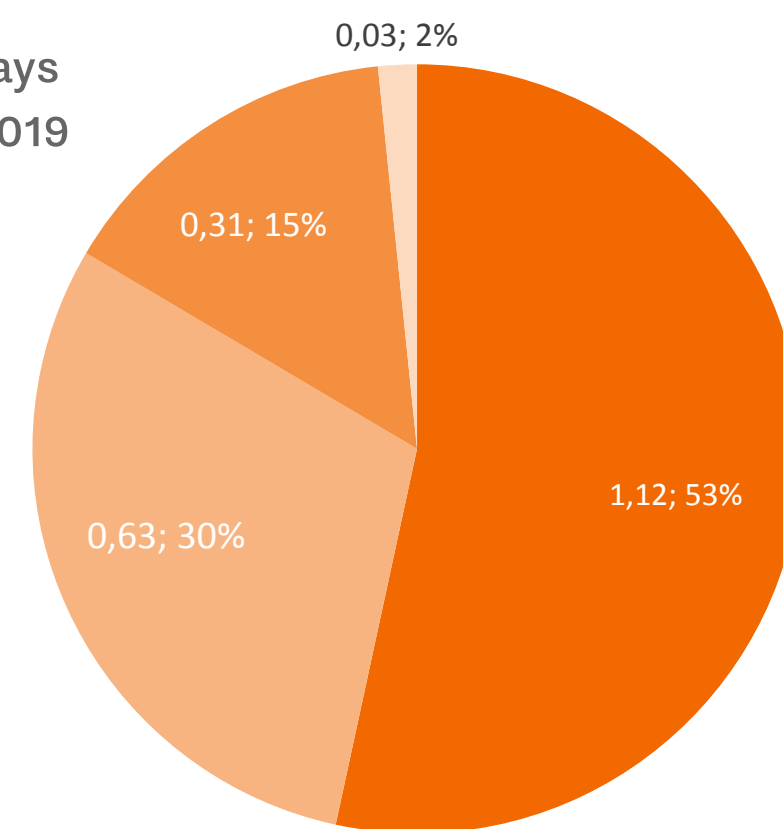
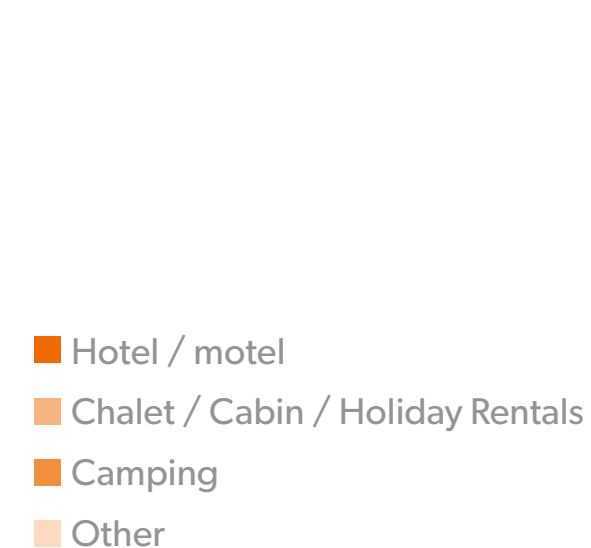


Figure 4 The CO₂ emissions from tourist overnight stays in the Netherlands in 2019 by accommodation type^{35 7}

What is needed?




A key opportunity for making tourist accommodation climate-neutral is the plethora of information and knowledge available. The study⁷ by Booking.com referred to above, highlights energy-saving measures that business owners can take, supported by a positive business case. The World Travel & Tourism Council also provides hotel business owners with information via their Hotel Sustainability Basics.⁷ In addition, business owner's can immediately start measuring current emissions using the Hotel Carbon Measurement Initiative⁷ tool of the Sustainability Hospitality Alliance. There is also a lot of information⁷ about sustainability available via generic SME channels of the government. Furthermore, where this is not already happening, all accommodations can start buying green electricity.

Levels of government, DMOs and industry associations, each with their own resources, will need to alert business owners to the opportunities of responding to sustainability now and the requirements involved. This is helped by the fact that more and more consumers consider sustainability to be an important issue, despite not always acting sustainably. DMOs in particular can help consumers by making sustainable choices at their destinations visible and giving sustainable choices extra attention in marketing campaigns and when providing information. Levels of government can also play a role in funding and subsidising interventions. There is more information on this in the chapter on [Funding](#). An important impact can be made by including climate-neutrality in ongoing programmes, such as the revitalisation of holiday parks.

Together, we want to take the road towards climate-neutrality of accommodations. Highlighting the best examples helps with this, both with regard to consumers and fellow business owners. Another effective tool is providing assistance to business owners struggling to make their businesses more sustainable. Customisation is the key word. Climate plans, containing each company's individual road to climate-neutral business operations, are a good methodology.

⁷ SASTDES Carbon Footprint Tool (Smart Assessment Sustainable Tourist Destinations)

4.4 Accommodation

Line of action	Government	Business sector	Branch organisations	Knowledge institutes	DMOs
 <h3>Knowledge sharing</h3>	<ul style="list-style-type: none"> • facilitating research. 	<ul style="list-style-type: none"> • implement the research-based interventions needed to achieve climate-neutrality; • enhance knowledge to drive consumer behaviour change. 	<ul style="list-style-type: none"> • facilitate research on the interventions needed to achieve climate-neutrality; • share existing valuable insights. 	<ul style="list-style-type: none"> • initiate research on interventions to achieve climate-neutrality; • expand and improve existing insights. 	<ul style="list-style-type: none"> • gain insight into the level of sustainability of accommodations at the destination; • share existing valuable insights; • foster the expansion of knowledge to stimulate consumer behavioural change.
 <h3>Sustainability of accommodation</h3>	<ul style="list-style-type: none"> • facilitate business owners with knowledge of opportunities, requirements and funding options; • nationally and locally: incentivise with subsidies where possible and with requirements where necessary; • nationally, specifically for new builds: require 100% climate-neutrality upon completion; • over time: standardise/impose requirements on existing construction; • locally: introduce strict climate requirements when realising new accommodation at the destination; • accelerate by a customised approach together with industry associations, knowledge institutions and DMOs. 	<ul style="list-style-type: none"> • measure emissions, purchase green power; • invest in the realisation of necessary measures to help achieve climate-neutral accommodation. 	<ul style="list-style-type: none"> • make support accessible for the necessary planning, action and investment; • create awareness about sustainability among business owners, both about the necessity and requirements, and as well as about the opportunities; • give the best examples a platform and facilitate collaboration. 	<ul style="list-style-type: none"> • develop and provide templates for climate plans; • identify the best road to climate-neutral business for different types of accommodation. 	<ul style="list-style-type: none"> • give forerunners a platform; • make opportunities and assistance accessible to local business owners in order to formulate climate plans and associated investments.
 <h3>Labels and certifications</h3>	<ul style="list-style-type: none"> • explore the opportunities and effectiveness of a national 'white-label' for sustainability versus a government-driven label (cf. energy labels for white goods and homes). 	<ul style="list-style-type: none"> • certification with a recognised sustainability label and use this as an aid to sustainability. 	<ul style="list-style-type: none"> • thinking along and advising on smart and useful ways of labelling and certification. 	<ul style="list-style-type: none"> • explore the opportunities and effectiveness of a national 'white-label' for sustainability versus a government-driven label (cf. energy labels for white goods and homes). 	<ul style="list-style-type: none"> • use certified labels to show sustainable supply.

Example

1

Slovenia brings together various sustainability certifications under its own Slovenia Green label. Both destinations and business owners are entitled to use the Slovenia Green label with their existing certifications, each of which must meet international standards (such as from the Global Sustainable Tourism Council). In return, Slovenia's national tourism agency is offering participating parties more promotional opportunities, which should further increase the attractiveness of participation.

2

Conscious Hotels implements sustainability at all levels of its business operations. From the material and recyclability of its carpets and beds, to its use of circular towels and cleaning products without chemicals. The energy used is 100% green and smart showerheads save 35% water.

3

By 2050, all buildings in the Netherlands must be Paris Proof. The Dutch Green Building Council is trying to bring that goal forward by ten years with the Sustainable Renovation Delta Plan. To accelerate such sustainability, roadmaps are being developed for sectors and buildings. Existing roadmaps, such as those for offices, logistics and retail, help accelerate the sustainability of buildings in these sectors.



4.5 Leisure product range

Where do we stand?

The leisure product ranges in the Netherlands are numerous and diverse. These vary from museums to restaurants, and from amusement parks to beach bars. We do not have enough data to precisely indicate the CO₂ impact of leisure product ranges. What is certain, however, is that organisations and companies in this sub-sector will also have to strive towards climate-neutrality by 2050. Regarding the sustainability of buildings in which recreation takes place, there are many similarities with the [accommodation](#) chapter. The analysis and actions mentioned there are also applicable to many leisure product ranges. The reverse is also true: the analysis and action under 'Leisure product range' is largely also relevant to accommodation.

Besides making physical buildings more sustainable, there are opportunities regarding policies for food and plastics in particular. With regard to food, there are large differences in the CO₂ impact of products, especially when it comes to protein. One kilo of steak produces an average of 34 kg of CO₂ emissions compared to 5 kg for a beef croquette and 1 kg for beans and pulses.⁷ There are various initiatives and pilots, often in the form of collaborations between business owners and the government, with the goal of reducing the climate impact of food, for example by reducing portions of red meat and adapting

menus. As well as working with suppliers to shorten chains provides further opportunities to reduce unnecessary CO₂ emissions. The use of single-use plastic is also a key challenge in relation to reducing CO₂ emissions. At European level, there is a ban on plastic straws, plates and cutlery. The Netherlands already bans plastic straws, cutlery and plates. From 1 July 2023, there will be a ban on providing single-use plastic meal containers 'on the go' for free. And from 1 January 2024, this ban will also apply to disposable cups and meal containers used by catering establishments, in offices and at festivals.⁷ In the Netherlands, over 200 business owners signed the Plastic Pledge, promising to prevent pollution through the use of plastic.⁷

CO₂ emissions by the economic sector culture, sports and recreation in the Netherlands 2012 - 2020 (Megatons CO₂)

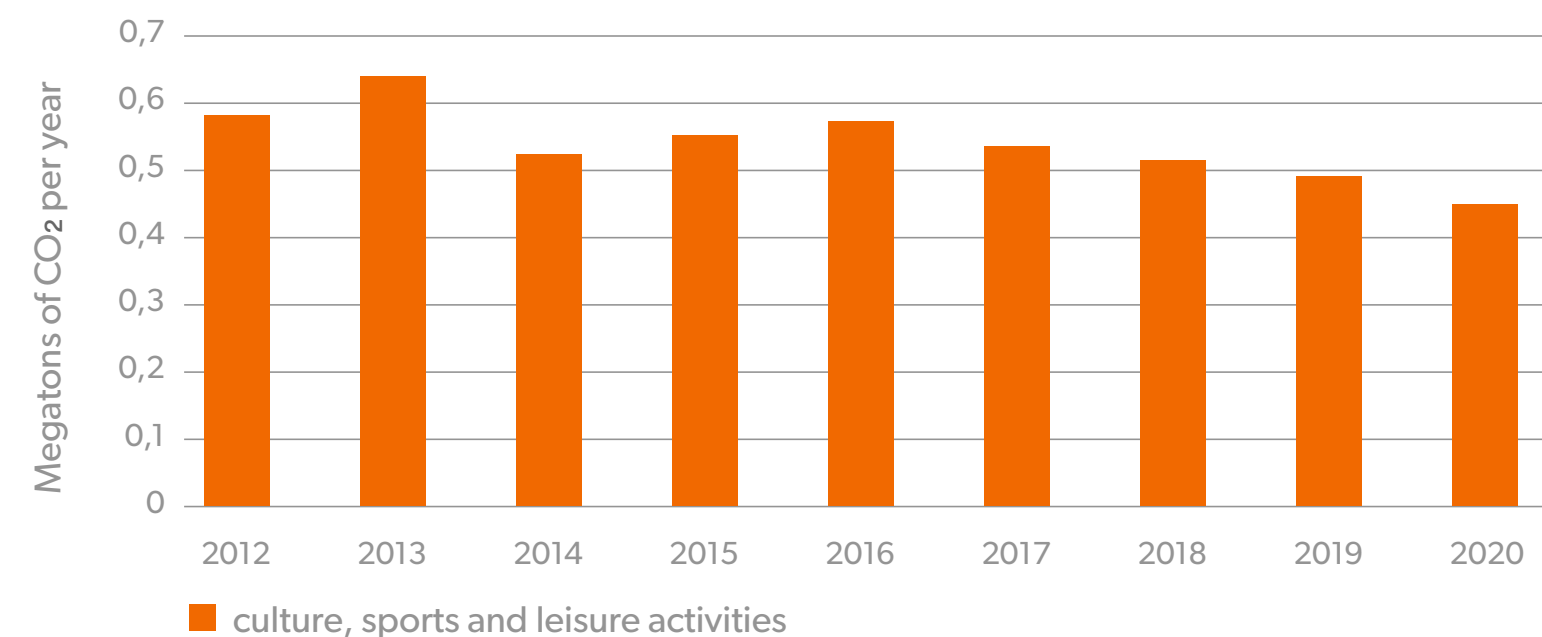
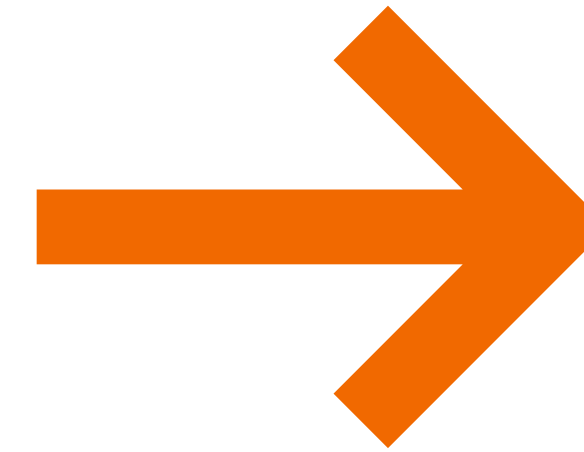


Figure 5 The CO₂ emissions of the Dutch culture, sports and recreation sector in the period 2012 - 2020




Source: Emissions to air by the Dutch economy; national accounts. CBS, 2022. The CO₂ emissions shown are the total emissions of all Dutch companies active in the economic sector 'culture, sports and recreation'. These business activities often do not focus exclusively on tourists. *Figures for 2020 are provisional.



What is needed?

There are numerous actions that business owners can take, including the simple ones, to work towards climate-neutral and sustainable business operations. Considerable momentum is derived from examples of forerunners and further opportunities and possibilities, shared by industry associations, levels of government, knowledge institutions and DMOs. This requires a good combination of inspiration, knowledge and the right incentivisation: preferably positive, where necessary normative. Quick wins are a good first step to take; such as choosing green energy, reducing plastic use, measuring emissions. The ultimate goal is for each company to work towards completely climate-neutral business operations.

4.5 Leisure product range

Line of action	Government	Business sector	Branch organisations	Knowledge institutes	DMOs
 <p>Climate neutral business as the norm</p>	<ul style="list-style-type: none"> • provide clear frameworks and targets, for example maximum CO₂ emissions per company, which are in line with climate targets; • incentivise with subsidies where possible, standardise where necessary. 	<ul style="list-style-type: none"> • make climate-neutral business an integral part of business operations; • start with what can already be done now: green electricity, monitoring emissions, making own purchasing more sustainable, etc; • implement an internal CO₂ pricing system for planning and management. 	<ul style="list-style-type: none"> • facilitate the sector with inspiration, research and support. 	<ul style="list-style-type: none"> • develop tools for sectors and sub-sectors to provide insight into the road to full CO₂ reduction; • develop business models for climate-neutral business. 	<ul style="list-style-type: none"> • give the best examples a platform; • make sustainability a standard part of both own business operations and the partner model.
 <p>Sustainable menu</p>	<ul style="list-style-type: none"> • develop and share knowledge about the impact of food on climate; • tax food that has a higher footprint; • implement a food waste monitor and waste reduction programme. 	<ul style="list-style-type: none"> • revise menus, develop more vegetarian options, reduce the selection of red meat; • switch to a menu with no more than 20% animal protein; • buy local, shorten chains; • learn from pilots and studies; • implement measures to reduce food waste. 	<ul style="list-style-type: none"> • facilitate business owners who have knowledge and experience of food and shorter chains; • learn from pilots already conducted. 	<ul style="list-style-type: none"> • develop and share knowledge about the impact of food on climate; • develop and share knowledge on consumer behaviour change in this area; • explore the smartest road to protein transition for different types of F&B outlets & guests; • share and develop knowledge where necessary on reducing food waste. 	<ul style="list-style-type: none"> • give the best examples a platform; • collaborate with sustainable agri-business owners.
 <p>Reduce plastic consumption</p>	<ul style="list-style-type: none"> • adopt and enforce European regulations. 	<ul style="list-style-type: none"> • reduce use of plastic, use available toolkits. 	<ul style="list-style-type: none"> • encourage and facilitate business owners with available toolkits. 		<ul style="list-style-type: none"> • give the best examples a platform.

Example

1

The Tourism & Plastic Starters Guide by ANVR, MVO-Nederland and the World Wildlife Fund offers business owners some simple solutions to reduce their plastic consumption. The guide shows what alternatives are available for common plastic products. The guide also provides standard texts about sustainability choices that business owners can use for their suppliers.

2

Duurzame Horeca Nederland is working with business owners and governments in Leiden and the surrounding area to accelerate sustainability in catering establishments. For example, providing information to business owners on energy saving and concrete projects on smart reduction, separation and disposal of catering establishments waste.

3

A study by Natuur & Milieu and Greendish at 23 restaurants in Gelderland showed that restaurants could reduce CO₂ emissions from their menus by 51%. They achieved this by reducing portions of red meat, changing meat-to-vegetable ratios on the plate and increasing the number of vegetarian options on the menu. This effect can be further enhanced by buying locally and seasonally, and actively reducing food waste.

4

Since July 2022, Beach Inn beach pavilion in IJmuiden can call itself the most sustainable pavilion in the Netherlands. Investments in making own business operations more sustainable include the installation of solar panels, making the product range more sustainable and using recycled materials in construction and furnishing. Important additional steps are being taken by Beach Inn through active cooperation with fellow beach tents and local authorities, as well as commitment to increasing awareness among guests.



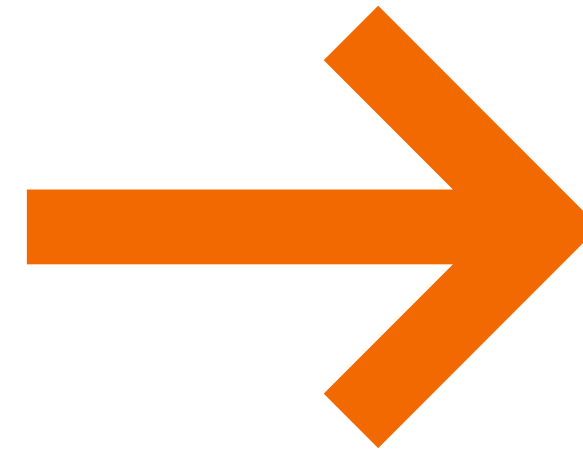
4.6 Tour operators, including online tour operators

Where do we stand?

Tour operators, including online tour operators, do not or rarely represent a physical part of the destination, but are an important link for consumers to get where they want to be. 51% of visitors to Holland use a tour operator or online platform to book their stay⁸. The impact of tour operators and such platforms is therefore potentially large. It is encouraging that major players such as Booking.com and Expedia signed the Glasgow Declaration, committing themselves to international climate goals and the development of a climate action plan. In doing so, Booking.com aims for 'net zero' by 2040. The company develops programmes to help make accommodation more sustainable. At their own initiative, consumers can filter the offer by sustainability. Since signing the Glasgow Declaration, Expedia has published a survey into consumer interest in sustainability. The platform currently does not allow visitors to filter by sustainability.

According to the World Travel & Tourism Council, about a third of tour operators are currently actively working on sustainability. Another third are hesitant about what steps to take and another third are not taking any action.⁷ The overall picture is that tour operators are increasingly working towards climate-neutral tourism (see box), despite their generally differing target groups.

⁸ Inbound Tourism 2022 Survey, NBTC (not yet published; based on unweighted results through August 2022 (n = 6,057))



What is needed?

Because of their position between supply and demand, tour operators and online platforms can make a substantial difference, with regard to both business owners and consumers. Because they are in direct contact with consumers, they can point them towards sustainable options. For example, platforms can choose to set up their algorithms so that sustainable options always appear at the top of the page. Tour operators in turn can educate consumers throughout their choice process about the climate impact of choices and on more sustainable options, including the trip itself.

On the supply side, tour operators need to start choosing sustainable accommodation and transport options. Platforms can incentivise their partners with both information and financial incentives, including reducing commission rates. These are potentially very powerful incentives, which can be fully implemented by private players.

From the perspective of the Netherlands as a destination, it would be valuable to gain more insight into the extent to which tour operators, including online tour operators, take part in this type of activity and to encourage and incentivise them to do so more intensively. This is where action points exist for government and DMOs as well as knowledge institutions.

4.6 Tour operators, including online tour operators

Line of action	Government	Business sector	Branch organisations	Knowledge institutes	DMOs
 <p>Increased insight</p>	<ul style="list-style-type: none"> facilitate research and monitoring, for example on the extent to which tour operators offer a sustainable product range. 	<ul style="list-style-type: none"> share data and facilitate researchers; be transparent about what works and what does not. 	<ul style="list-style-type: none"> facilitate joint research and share results; encourage openness and transparency. 	<ul style="list-style-type: none"> gain more insight into the climate impact of tour operators, including online tour operators. 	<ul style="list-style-type: none"> facilitate insight into the extent to which tour operators offer a sustainable product range.
 <p>Online platforms</p>	<ul style="list-style-type: none"> set requirements for the conditions under which online platforms are allowed to operate in the Dutch market. For example, with regard to stating the CO₂ impact of travel or the use of recognised labels. 	<ul style="list-style-type: none"> encourage sustainable supply through incentives, for example commission and algorithms; promote a sustainable product range; collaborate on research, such as into the sustainability of accommodation and behavioural management. 	<ul style="list-style-type: none"> share what works and what does not, and inspire with the right examples. 	<ul style="list-style-type: none"> collaborate on research, such as into the sustainability of accommodation and behavioural management. 	<ul style="list-style-type: none"> encourage the positioning of a product range at the own destination.
 <p>Sustainability of tour operators</p>	<ul style="list-style-type: none"> explore the possibilities of mandatory labelling for package travel, similar to the energy label for homes and white goods. 	<ul style="list-style-type: none"> learn from what the forerunners are already doing; define measures to achieve climate-neutral operations; choose the most sustainable forms of product range, transport and entertainment; inform consumers about their impact and choice of options both before and during their journey, customised to the target audience. 	<ul style="list-style-type: none"> encourage action, share what works and what does not, and inspire with the right examples. 		<ul style="list-style-type: none"> impose sustainability requirements on collaborating tour operators; encourage tour operators to include sustainable product ranges.

Example

1

Intrepid Travel has been climate-neutral since 2010 (partly through offsetting) and is constantly looking to further reduce emissions and increase sustainability in other areas. Uniquely, Intrepid shares its learnings with other tour operators, for example through its own Carbon Measurement Calculator for tour operators. This makes Intrepid an example of much-needed transparency in this area.

2

UK-based Byway Travel organises unique and sustainable trips, using only train, bus, boat or bike. Fly-free travel is the mantra, as is encouraging travellers to stay away from hotspots. In their trips to the Netherlands, for example, they promote the Wadden Islands and ‘canal towns’ beyond Amsterdam.



5

Strengthening ecosystems

This roadmap focuses on the reduction of CO₂ emissions. However, climate-neutral tourism goes beyond this and touches on the sustainability theme in other areas. In essence, this is about a net positive impact of visitors on economic and social aspects of our society, within the ecological limits of our planet. Purely on an ecological level, this means that there are many other elements that will currently or shortly create urgent challenges for the Dutch visitor economy. These challenges each deserve their own approach. We mention some of these key sustainability themes so that we can address them in the most comprehensive way possible. In this regard, it is important to constantly check whether the measures we want to take for the benefit of one challenge do not come at the expense of another theme.

5 Strengthening ecosystems

Air quality

Tourism, by definition, involves travel and transport. Different means of transport produce emissions to a greater or lesser extent, which affect air quality. Air quality is determined by the amount of pollutants and gases in the air. For example, depending on the means of transport, unsustainable travel movements cause emissions of nitrogen, carbon monoxide, sulphur oxide and particulate matter. This applies to movements involving both passenger cars, cruise ships and aircraft. Compared to the other modes of transport, rail transport makes a

negligible contribution to air pollution. Solutions that improve air quality not infrequently correspond to the measures needed to make transport to and within the Netherlands climate-neutral: emission-free zones, electrification of passenger cars, investments in charging infrastructure, limiting or reducing the number of air movements and sustainable last mile solutions to and from airports.

Water use and quality

Tourism, like many other sectors, relies heavily on access to sufficient fresh water and is often a relatively large user of it. The impact of tourism-related water use varies by destination. For example, a relatively high impact applies to destinations with limited resources, a warm climate and/or a fluctuating rainy season. In the Netherlands, we are in the luxury position of taking access to clean drinking water for granted. However, the supply of clean drinking water is under pressure. This is partly due to increases in pollutants in ground water, for example due to the use of chemicals and fertilisers, or poor waste management.

On top of this, we are also increasingly facing longer periods of drought with additional impending water shortages and extreme rainfall in short periods of time. This requires a different way of organising parts of our country; from draining water as fast as possible, to draining and holding it for later.

Biodiversity and landscape quality

Human-induced landscape change is one of the causes and consequences of global climate change. Human-induced changes in soil structure and land use are strongly linked to climate change. The same applies to biodiversity loss and water issues. Tourism relies strongly on an attractive landscape. At the same time, tourism directly and indirectly requires facilities that have an impact on the landscape.

Multiple societal challenges, including climate change, nitrogen crisis and energy transition, mean that the Netherlands is on the eve of a transformation of its landscape. In this context, nature inclusiveness is an important theme. We need to move towards a nature-inclusive society, in which we prevent damage to nature

in all parts of society while exploiting nature's potential. For example, consider nature-inclusive design of gardens around hotels and the roll-out of grass roofs.

Within the Agenda, specific attention is paid to what nature inclusiveness means for the hospitality sector, for example, the development of recreational nature businesses, but also the development of the natural landscape and combining green-blue veining with walking, cycling and boating opportunities. More generally, it is important to use the major redevelopment task of our landscape as an opportunity for tourism and recreation, and to keep visitor value and experiences in mind in the planning process. In principle, visitors are an opportunity for the Dutch landscape. During the redevelopment of the landscape and resolving social tasks we need to think carefully about what is best to do and where. In other words, how to protect nature and make the landscape attractive at the same time. This benefits nature, residents and visitors alike.

Example

The Nature Inclusive Agenda⁷ is an initiative of the Ministry of Agriculture, Nature and Food Quality including the interprovincial consultations, Natuurmonumenten, Staatsbosbeheer and Landschappen NL. The Agenda sets the course in the Netherlands towards a nature-inclusive society, in which nature is seen as the basis of our health and economy. The aim is to strengthen the nature and landscape everywhere in the Netherlands, not just in nature reserves. In a nature-inclusive society, we enhance natural values and harness the positive power of nature.

Example

Natuurmonumenten⁷ describes how Dutch surface waters do not yet meet 1% of the quality requirements set by the European Union. In fact, water quality is deteriorating and groundwater levels in our country are structurally too low. As with the nitrogen crisis, it is not only nature that is affected. Permit applications for all kinds of projects, such as housing and road construction, can be rejected on this basis. Strict regulations and enforcement of groundwater use can still turn the tide, as can stricter manure and pesticide policies, provided these measures take effect very soon.



6

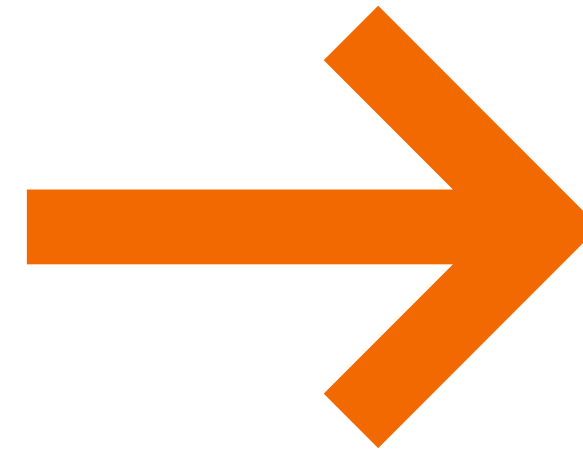
Funding and support

Where do we stand?

The tourism sector relies heavily on a relatively large number of small and medium-sized business owners. This fragmentation and relatively small scale makes sustainability in general and climate-neutrality in particular difficult. Major reasons for this are a lack of financial resources, time and/or know-how. There is also a need for more direction and clarity.

Research by both CELTH⁷ and NBTC shows that matching funding and developer is a major challenge and that tourism is often unknown to private funders. The fact that business plans are not always delivered fully substantiated further complicates funding. Research firm Dialogic, which conducted research on the industry's funding options in 2022 on behalf of the Ministry of Economic Affairs, found that the tourism industry does not have a strong focus on sustainability.⁷ Business owners who are aware of the need for sustainability tend to lack investment resources. Sector-specifically, the corona pandemic also caused the financial reserves of mostly small-scale family businesses to shrink more than the average. There is also an above-average lack of working capital, capacity and time.



Dialogic's analysis further shows that SME business owners have several general and sector-specific funding schemes available for sustainability. However, these schemes do not always fit well with business owners' operations: funding thresholds are often high and turnaround times long. Local schemes are most accessible to SME business owners, but often do not provide sufficient financial clout. The European Commission is currently offering 15 different funding schemes for the tourism sector over the 2021-2027 period. An online guide provides an overview of which scheme applies to specific sub-sectors and business owners.⁷



What is needed?

There are opportunities for government, industry associations and DMOs to help business owners by improved matching and unlocking of existing public and private funding opportunities. Customised solutions that respond to individual business owners and their local context seem most promising. An area-based approach is desirable, where the development of the tourism product range is determined and fleshed out from an integral view of the desired development of the area. This results, for example, in local knowledge exchange between frontrunners and interested parties on the methods and benefits of making accommodation more sustainable and local subsidy opportunities. Continuous learning is important here, on the one hand about what incentives work best and, on the other hand about what method best encourages business owners to take action. Collaboration between the government, implementing organisations, knowledge institutions, industry associations and DMOs is essential here.

The effects of climate change also bring financial risks. To strengthen business continuity and resilience in the travel chain, it is necessary for organisations to know where their operations are vulnerable. Based on this analysis, organisations should take adequate measures to hedge against these financial risks, for example through insurance or by maintaining financial buffers.

Line of action	Government	Business sector	Branch organisations	Knowledge institutes	DMOs
 <p>Provide access to funding</p>	<ul style="list-style-type: none"> identify existing public funding options and make them easily accessible. 		<ul style="list-style-type: none"> actively develop and link funding advice for general public (matching); identify existing public funding options and make them easily accessible. 	<ul style="list-style-type: none"> develop benchmark for the sustainable financing rate sector (the extent to which sustainability is or can be financed in relation to bottlenecks). 	<ul style="list-style-type: none"> actively develop and link funding advice for general public (matching); explore the options of an incentive budget for boosting sustainable tourism product range.
 <p>Reduction of risk</p>	<ul style="list-style-type: none"> implement risk reduction mechanisms to financially support vulnerable areas. 	<ul style="list-style-type: none"> identify climate-related business operations and financing risks; develop financial instruments, including insurance, aimed at risk mitigation. 	<ul style="list-style-type: none"> support entrepreneurs in identifying climate-related risks to business operations. 	<ul style="list-style-type: none"> identify vulnerable tourist areas; develop data for the climate investment business case: avoided losses, economic benefits and community value. 	

Example

1 Fonds Verblijfsrecreatie Zeeland supports businesses that want to invest in quality improvement and sustainability to make their business future-proof. The fund focuses on financial support for business owners with plans aimed at circular building, energy transition and nature and landscape development, fitting within the framework of the Zeeland Coastal Vision. This will create high-quality and diverse residential recreation that suits Zeeland and strengthens its economy.

2 Specifically for energy saving, MKB-Nederland launched the Sustainable Energy Saving website. The website gives SMEs customised advice on packages of energy-saving measures. The result is more sustainable operations, not infrequently with substantial cost savings.

3 From the National Agency for Entrepreneurs (Rijksdienst Voor Ondernemers) the website MKB Doet Wat assists business owners to make smart choices regarding the sustainability of their business and business premises. Through a smart tool, business owners are guided past both obligations and opportunities. This will give them clarity and understanding of what can and what must be done, and what schemes are available to SMEs.



7

Cooperation and leadership

The previous paragraphs show how broad and diverse the road to climate-neutral tourism is. While there is much that each of us can - and should - do ourselves tomorrow, we can only achieve climate-neutral tourism in the Netherlands together.

The advantage here is that the goals are fixed. We all need to achieve substantial reductions in our emissions. In this context, the 2030 target is fast approaching. We can actually achieve this with boldness, leadership and intense cooperation.

We will naturally give a platform to the right examples, both from inside and outside the industry. After all, leading destinations and business owners are an inspiration to others within the same sector. In addition to this, we as a sector will have to collaborate much more intensively, both with each other and with smart or inspiring parties from outside our familiar environment. For example, with regard to challenges to behavioural change of travellers or business owners, or in drafting climate action plans for sub-sectors.

Boldness, leadership and transparency are a requirement to do this really effectively. Competition and puffed-up egos are obstacles on the road to climate-neutral tourism, and to sustainability in general. Boldness is sometimes needed to make the less straightforward choice. Leadership is needed when we make choices that lead to criticism. And transparency makes us open about our interests, concerns and commitment. In our cooperation, there must be room for an open, honest and vulnerable attitude. And to dare to fail, because it is precisely from mistakes that we can learn so much.

There are many questions and measures in this document, as well as in the Leisure, Tourism & Hospitality Sustainability Research Agenda.⁷

We make it easy on ourselves when we work on this in coalitions. From a shared interest and with our eye on the common goal, we can work on gathering and sharing knowledge, innovation, removing financing obstacles and drawing up concrete climate plans for sub-sectors.

By creating a network of the Netherlands as a destination, in which these coalitions can emerge and in which we can reflect back the learnings from joint activities, we secure our cooperation and strengthen the feeling that we are working together on tomorrow's tourism. An action-oriented network helps us transcend the many divergent interests and help each other make choices that are sometimes difficult. From the awareness that the challenge is great, but also from the hope and positivity that we can come out of this together.

Epilogue

In this roadmap, the authors have tried to show what is needed to achieve climate-neutral tourism in the Netherlands. This is based on input from academia, reports that have already been published, opinions and policy documents as well as experience from the sector.

Three key themes

There are three key themes running through this report that tell us more about where we are and why our sector is not yet succeeding enough.

The first key theme is that innovation alone is not going to save us. Nevertheless, we must be fully committed to finding relevant innovations by working together and investing in them together. In almost every sub-sector described, we hope for a magic bullet that will help us continue to grow as we do now. However, the reality is that those magic bullets are not here as yet.

A second key theme is that although an increasing number of consumers and business owners consider that climate change is an urgent and major problem, they are struggling to turn their concern into sustainable measures. At the same time, they are the actors who ultimately have to make the sustainable choices we need as a society. As a destination, being the sector, government, DMOs, knowledge institutions and industry associations, it is up to us to assist business owners and consumers make smart choices.

One important aspect that we possess: knowledge of target groups, customer journeys and marketing. We know how powerful financial incentives are, but also how powerful it is to make the standard choice a sustainable one. By increasing and using this knowledge, we can make a difference.

Finally, big issues like climate change require action and collaboration that does not

necessarily fit the current role of organisations. We can clearly see that something needs to be done, but who should do what and especially who should pay for it are big questions. This delays the process. To remove this delay, we all need to look at our own roles and actions. Leadership, boldness and transparency, as mentioned earlier in this document, are essential for this.

Five measures that we can implement immediately

Let us take up this challenge together. And even though not all the above measures mentioned in this document can be implemented tomorrow, there are five steps we can take together now.

1

Make a start and follow through

We will now have to move towards climate-neutral tourism. All organisations active in the Netherlands as a destination determine their own approach in this regard. It is recommended that, as an aid to this, you start by drawing up your own climate plan. In it, people can indicate what they are already able and willing to do, but also where assistance is still needed. This offers immediate opportunities for collaboration between organisations and business owners, both in drawing up an inventory and in the request for assistance.

2

Standardise and encourage desired measures

Authorities, from local to national, assist the Netherlands as a destination by providing a clear vision, complying with instructions and clearly standardising and incentivising the desired action. This includes the realisation that this kind of cross-sectoral issue requires guidelines from the levels of government. Even if this means that not all interests can be reconciled.

3

Programme development with focus on local perspective

Industry organisations, knowledge institutions, levels of government, leading business owners and DMOs together design programmes and respond to existing programmes in order to get the very diverse SME business owners on board with what is needed to achieve climate-neutral business operations. Customisation and a local perspective are key here.

4

Joint study into opportunities for behavioural change

Knowledge institutions, levels of government, DMOs, trade associations and industry are jointly investigating the best ways to encourage behavioural change among consumers and business owners. In this regard, we can learn from experience gained elsewhere. By doing this together, we can combine theory and practice and create use cases that we can share with the whole sector and beyond.

5

Creation of an action-oriented network

The Netherlands as a destination unites in an action-oriented network in which we share knowledge and good examples, bring together supply and demand and initiate coalitions to realise the goals set. In doing so, participating organisations look beyond their existing roles and consciously stick their necks out. It is clearly desirable to supplement and make use of already existing networks and initiatives.

With these five measures that we as a sector can implement now, we will move from good intentions to concrete action - and can accelerate substantial steps towards climate-neutral tourism in the Netherlands.

Organisations involved

The parties listed below are involved in various ways in the compilation of On the Road to Climate Neutral Tourism. Through conversations, interviews, participation in focus groups, or by being part of the working group established by the Hospitality Economy Taskforce.

While this document reflects the input of all stakeholders currently involved as completely and accurately as possible, the involvement of these organisations does not automatically mean that they fully support all the analyses and action described in this publication. Most importantly, on the road to a sustainable and climate-neutral future, these parties want to jointly look for opportunities and challenges that we can work together on even more intensively. In doing so, each organisation is free to set its own pace and commitment. With respect for each other's interests but, bearing in mind what is coming our way, we are therefore looking for smart coalitions and collaborations.

ANWB
Booking.com
BUas, Centre for Sustainability,
Tourism and Transport (CSTT)
Centre of Expertise Leisure,
Tourism and Hospitality (CELTH)
Colliers
Dutch Green Building Council (DGBC)
Dutch Delta Cruise Port
Efteling
Eindhoven365
Gastvrij Nederland
Gemeente Amsterdam
Gemeente Schouwen-Duiveland
Green Destinations
Green Key
HISWA-RECRON
Destinatie Nederland
KHN - Koninklijke Horeca Nederland
KLM
Merk Fryslân
Ministerie van Economische Zaken en Klimaat
MKB-Nederland
NBTC | Nederlands Bureau voor
Toerisme & Congressen
NHL Stenden
Nationale Parken Bureau

Provincie Flevoland
Provincie Fryslân
Provincie Zeeland
Provincie Zuid-Holland
Sea Going Green
Stayokay
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All texts and visuals in this publication can be shared and reproduced, as long as correctly referenced. Although we have excersided due care in the preparation of this publication, there is always a possibility that certain information or translations are incorrect, or outdated by time of reading. Where possible, sources have been referenced.

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Do you want to work with us towards climate neutral tourism in destination the Netherlands? Get in touch with the Netherland Board of Tourism & Conferences through klimaatneutraaltoerisme@holland.com.

